

## 19-02-10 RFP /Address Verification Software



### REQUEST FOR PROPOSALS

RFP # 19-02-10

### Address Verification Software

#### PART II

The Houston Independent School District (“HISD” and/or the “District”) is soliciting proposals for **Address Verification Software** as more fully set out in this Request for Proposals (“RFP”). One (1) hard copy original of the proposal, one (1) hard copy duplicate of the original, and two (2) USB drives of the proposal must be submitted in accordance with the instructions set out herein to:

Houston Independent School District  
Board Services - Room 1C03  
Attn: Gerardo Garcia – Purchasing Services  
**RFP / 19-02-10 Address Verification Software**  
4400 West 18<sup>th</sup> Street  
Houston, TX 77092

The following schedule and timelines apply to this RFP. The following timelines are subject to change at the District’s discretion:

Timeline	
Release RFP	Friday, May 17, 2019
Pre-Proposal Conference	Tuesday, May 28, 2019 at 4400 West 18 <sup>th</sup> Street, Houston, Texas 77092, in Conference Room 2C16, 2:00 p.m.
Last date for questions:	Thursday, June 6, 2019 at 2:00 p.m. CST
Proposals Due	Tuesday, June 18, 2019, at 10:00 a.m. CST
Evaluation Period	Tuesday, June 25, 2019 to Tuesday, July 9, 2019
Board Meeting Date	Thursday, August 8, 2019 (Subject to Change)

Each set of the proposal must be submitted in a binder. The original proposal must be labeled “ORIGINAL” and contain original signatures. The copies of the original must be labeled “COPY.” Response submission must be delivered in a sealed folder or container (i.e. envelope, box, or bin). If documents are submitted in an unsealed container or folder, the District is not responsible for any unsealed/unlabeled documents and materials.

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Each binder and any container for the binder(s) must be labeled on the outside with the Proposer's name, address, the RFP number and the RFP name. Each USB drive must be labeled with the RFP number and the vendor name.

**Proposals will be received at the above address until Tuesday, June 18, 2019, at 10:00 a.m. Central Standard Time. A Pre-Proposal Conference will be held in conjunction with the RFP on Tuesday, May 28, 2019, at 2:00 p.m. at 4400 West 18<sup>th</sup> Street, Houston, Texas, 77092, in Conference Room 2C16 4400 West 18<sup>th</sup> Street, Houston, TX 77092.**

Submitting proposals prior to the pre-proposal conference is not recommended, and such proposals may be rejected by HISD. Proposals will be reviewed as received in a manner that avoids disclosure to competing proposals. Contents of proposals will remain confidential during the negotiation period.

**Faxed or emailed proposals will not be accepted.** Proposals must be submitted in sufficient time to be received and time-stamped at the above location on or before the proposal due date and time. HISD will not be responsible for proposals delivered late by the United States Postal Service, or any other delivery or courier services. Proposals received after the Proposal due date and time **will NOT be considered**. All proposals must remain open for one hundred twenty (120) days from the proposal due date pending acceptance by HISD.

Gerardo Garcia shall serve as your designated Category Specialist during the proposal process and is available via email at [ggarci24@houstonisd.org](mailto:ggarci24@houstonisd.org). All communications pertaining to the RFP shall be addressed in writing to the Category Specialist

Questions concerning the RFP will be answered only if sent to the Procurement Services Department, in writing via email to Gerardo Garcia **no later 2:00 p.m. Central Standard Time Thursday, June 6, 2019**. All questions submitted in writing to the following email address [ggarci24@houstonisd.org](mailto:ggarci24@houstonisd.org) prior to the deadline will be answered in the form of an addendum. All Addenda will be posted on the HISD Purchasing Services website.

Part I General Terms and Conditions for Requests for Proposals governs this RFP and any contract(s) awarded under this RFP.

**The District will award this RFP to one or more supplier(s) based upon the evaluation of all proposals received.** More details regarding the evaluation of proposals are included in Section II below.



Alexis Licata, Officer, Business Logistics & Purchasing

May 17, 2019

Date

**SECTION I:**  
**PROPOSAL RESPONSE REQUIREMENTS**

The Proposal shall be submitted in a binder with tabs as set forth below:

**Title Page**

Show the RFP number and title, the name of the Proposer's firm, address, telephone number, name of contact person, and date.

- **Tab 1 – Table of Contents**

Clearly identify the materials by sections and page numbers

- **Tab 2 – Proposal Submission Forms**

Complete and return forms listed below as set forth in Part III of this RFP. The set of forms submitted in the proposal marked "ORIGINAL" requires original manual signatures. Copies of the forms bearing original signatures should be included in each additional proposal.

The forms provided in Part III should be submitted in the following order:

1. FORM A: Supplier Information
2. FORM B: Attachment B - M/WBE Instructions and Participation Report
3. FORM C: Certificate of Insurance (Acord Form) or a letter from its insurance provider stating that Proposer can provide the levels of insurance required in this RFP.
4. FORM D: Reference Survey Instructions
5. FORM E: Reference Survey
6. FORM F: Price Schedule – must be submitted in both print and Excel Format
7. FORM G: General Certifications
8. FORM H: EDGAR Certifications
9. FORM I: Conflict of Interest Instructions and Questionnaire (Form CIQ)
10. FORM J: Instructions for Completion of Disclosure of Interested Persons Certification (HB 1295)
11. FORM K: IRS Form W-9 (updated October 2018)
12. FORM L: Exceptions
13. FORM M: Criminal History Background Check Certification
14. FORM N: Acknowledgement Form
15. FORM O: N/A
16. FORM P: Questionnaire, must be submitted in print and Excel Format

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- **Tab 3 – Profile of the Proposer**

- a. Indicate the key people in your organization assigned with a hierarchy chart to provide this service to the District and their level of experience and qualifications and the percentage of their time that will be dedicated to this project.

- **Tab 4 – Scope Section**

Respond in detail to the Scope of Work in Section II for the goods and / or services required.

- **Tab 5 – Questionnaire Response**

Respond to the questions and/or questionnaires included in the RFP.

- **Tab 6 – Invoice Procedure**

- a. Describe the proposer's invoicing procedures.
- b. Include documentation identifying all of the Proposer's fees.
- c. Payment terms. The District's standard payment terms are 30 days after invoice is received. State any payment discounts that your company offers, i.e., 2% 10 days – net 30; or 5% 7 days – net 30
- d. Payment discounts will be applied to invoices under all projects where a proposer has been approved as a vendor.

- **Tab 7 – Price**

Any and all pricing information, including any alternate pricing proposals that may be acceptable for some projects. Include a hard copy of Form F (Price Schedule) in this section, also as a reminder the Price Schedule must also be filled out and returned in Excel format.

- **Tab 8 – Addenda**

Insert all addenda under this section. (Download, print, sign and include a copy of each addendum with your proposal under Tab 8).

- **Tab 9 – Criminal Background Check Form**

Insert one of the certifications that applies to your company:

- a. Criminal History Background Check Form - **With direct contact with Students**
- b. Criminal History Background Check Form – **No direct contact with students**

**The supplier's proposal will be considered non-responsive if the supplier fails to submit one of these Forms at the moment of submitting said proposal. Refer to Part I General Terms and Conditions, Section 1.19 Supplier Nationwide Criminal Background Check.**

**SECTION II:  
SCOPE OF WORK**

**2.1 SCOPE OF WORK:**

At a minimum, the scope of services required by the successful firm shall consist of the following from qualified individuals or firms.

- I. At minimum, the Houston Independent School District (“HISD” and/or the “District”) is seeking the following goods and/or services:
- II. It is the intention of the Houston Independent School District (HISD) to establish one or more contracts to furnish and/or deliver **Address Verification Software** from a Full-Service Provider Licensee for the NCOALink® database from the US Postal Service.
- III. This solicitation is intended to support HISD’s district-wide strategies to boost enrollment, and to support the recruitment goals of the six specific MSAP grant-funded schools. The purpose of the RFP is to establish pricing from qualified vendors to provide national Address Verification Software solutions. These awarded suppliers will be available for HISD end users to utilize at their discretion.
- IV. Vendors are requested to submit a proposal offering their total line of available products that are commonly purchased by government entities. HISD reserves the right to accept or reject any items included by Vendor in this section.
- V. **Mandatory Requirements:**  
HISD is seeking a non-exclusive Licensee of the USPS® to provide Full Service NCOALink processing, and other USPS data products. The full NCOALink file retains these changes-of-address (COAs) for a four-year period from the move-effective date and the file is updated weekly. The NCOALink Product is a secure dataset of approximately 160 million permanent change-of-address (COA) records consisting of names and addresses of individuals, families and businesses who have filed a change of address with the USPS® (United States Postal Service®). Developed with secure data store technology to increase security of postal customer data and protect the privacy of this information, the NCOALink Product enables mailers to process mailing lists and update lists with new addresses prior to mailing. The NCOALink data is provided on a regular basis to companies that have been licensed by the Postal Service.
- VI. At minimum, the Proposer must outline the functionality of their software platform to accomplish the following:
  - i. Access to the NCOALink® database from the USPS
  - ii. Address format standardization
  - iii. Linking or chaining across multiple moves done by a single family or household
  - iv. Interface address changes with other databases used within HISD’s IT infrastructure (e.g., SIS)

- VII. At minimum, the Proposer must outline the costs associated with initial set-up (including processing up to 1 million unique individuals/families), as well as annual costs for up to 500,000 address verifications/ transactions per year. Additionally, the Proposer ought to identify the options available to HISD if a future stage of this project could include a direct interface with the Student Information System (SIS).
1. Sections 2.1 VI and 2.1 VII can be found as part of Form P Questionnaire in Tab 2. Questions must be answered in the Excel Form P Questionnaire uploaded as a separate attachment with this RFP.
- VIII. The District intends to award this bid to a single or multiple firm(s) selected to provide the “best value “to HISD per section 2.7 Evaluation Factors.

## **2.2 CUSTOMER RESPONSIBILITIES:**

After RFP, HISD will be responsible for providing the technical specifications requested by the Proposer.

## **2.3 VENDOR RESPONSIBILITIES:**

The Project Manager and CSRs must be available during Regular Business Days and will return calls within 1 Business Day.

## **2.4 SECURITY REQUIREMENTS:**

The Contractor must meet all conditions outlined in the District’s Data Sharing Agreement. Vendors must be willing to sign a **Data Sharing Agreement**. A Sample has been uploaded as a separate attachment. Currently, you do not need to sign the Sample District’s Data Sharing Agreement.

## **2.5 REPORTING REQUIREMENTS:**

Contractor shall make Data processing reports available to the Customer(s) within five (5) business days of written request.

## **2.6 COST:**

Price is to remain firm/fixed for the term of the contract. Price is to be provided on Form F and inserted in Tab 7.

**2.7 EVALUATION FACTORS:** The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFP. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

If the evaluation committee has reasonable grounds to believe that the Proposer is unable to perform the required services to the satisfaction of HISD, HISD reserves the right to make an award to another proposer. Some indicators (but not a complete list) of probable supplier/proposer performance concerns are: past supplier performance; the proposer's financial resources and ability to perform; the proposer's experience or demonstrated capability and responsibility; and the supplier's ability to provide a reliable on-going business relationship and the maintenance of on-going agreements and support.

Criteria #	Criteria Description	Weighted Value
1	the purchase base price	30%
2	the reputation of the Proposer and of the Proposer's goods or services	16%
3	the quality of the Proposer's goods or services	15%
4	the extent to which the goods or services meet the District's needs	20%
5	the Proposer's past relationship with the District	3%
6	the impact on the ability of the District to comply with laws and rules relating to historically underutilized businesses	10%
7	the total long-term cost to the District to acquire the Proposer's goods or services	3%
8	for a contract for goods and services, other than goods and services related to telecommunications and information services, building construction and maintenance, or instructional materials, whether the supplier or the supplier's ultimate parent company or majority owner: (A) has its principal place of business in this state; or (B) employs at least 500 persons in this state	0%
9	any other relevant factor specifically listed in the request for bids or proposals.	3%

**2.8 QUESTIONNAIRE:**

For the Questioner please refer to the uploaded Attachment 19-02-10 Form P. This questionnaire must be filled out in Excel format and placed on both USB drives. Additionally, a hard copy of the Questions and Answers is required as well. Please include responses in Tab 5 of the proposal response. Refer to attached 19-02-10 Form P Questionnaire.

**2.9 PRICING SHEETS INCLUDING ELECTRONIC SUBMITTAL REQUIREMENTS.**

This section intentionally left blank.

**2.10 Supplier Performance Evaluation:**

1. Supplier Performance Evaluation Criteria:

- a. The following areas may be evaluated quarterly, annually, or as needed by the user department, Career and Technical Education:
  - Quality of Product/Service
  - Delivery of Product/Service
  - Customer Service
  - Accuracy of Price
  - Comments and/or Concerns
  - Quarterly Meetings (as needed)
  - Response Time
  - Other Areas as per the Scope of Work and Questionnaire